

TECHNICAL REPRESENTATIVE ASSIGNMENT

_____ has been assigned the role of Technical Representative for Procurement Requisition No. _____ for the purposes set forth herein.

AUTHORITY AND REQUIREMENTS

The Technical Representative will interface with the Procurement Department regarding technical questions on the Procurement Requisition, and serve as the liaison with the vendor regarding technical issues after award of a purchase order, contract or agreement. For contractual questions, a Procurement Department representative will serve as the primary point of contact with the supplier after award of a purchase order, contract or agreement.

The Technical Representative and Buyer/Contract Specialist are responsible for the proper and effective management of the contract.

A. Evaluation, Pre-Proposal Conferences, Award, and Debriefings

1. The technical representative is responsible for development of the statement of work and the technical evaluation criteria that may be needed for a solicitation. Development of technical evaluation criteria is described in Exhibit 2.5-1, Guidelines for Preparation of Technical Evaluation Criteria.
2. In the event a sole source justification is appropriate, the Technical Representative is responsible to assure that appropriate information and justification is included in the request.
3. After issuance of the solicitation but before the proposals or quotations are received, a pre-proposal conference may be scheduled to allow prospective suppliers to visit the site where work is to be performed or to ask questions related to the solicitation. If a pre-proposal conference is scheduled, the technical representative will be expected to attend and answer technical questions.
4. Proposals or quotations will be reviewed and ranked in accordance with the technical evaluation criteria included in the solicitation, and the applicable Basic Source Selection Process Guidelines as described in section 3.5 of Chapter 3 of the Procurement Operations Manual (POM). The Technical Representative, as a technical evaluator or a member of a technical evaluation team (TET), and all the individual(s) participating on the team will be required to conform to conflict-of-interest and standards of conduct policies administered by the Procurement Department. Specific direction relevant for each procurement will be provided to technical evaluators by the Procurement Department to ensure a Conflicts of Interest Form (ANL-404) is obtained as necessary in accordance with ANL Human Resources Policy

No. 7100.1, Procedure No. 7100.1, and the ANL PRO Operations Manual (POM).

5. The Technical Representative will be responsible to assure that any supplier audits/surveys, etc., are conducted in accordance with the criteria contained in the appropriate solicitation or, if after award, in accordance with the requirements of the contract/purchase order.
6. After an award has been made, unsuccessful offerors may request debriefing. The Procurement Department may require the assistance of the technical representative to present information of a technical nature at the debriefing. The Procurement Department will conduct all supplier debriefings.

B. Directing Work and Other Technical Responsibilities

1. After a purchase order, contract or agreement has been awarded, the ANL Technical Representative has the responsibility to act as a liaison to assist and/or monitor the vendor in completion of the work as described in the contract, purchase order or agreement. The Technical Representative is at all times representing the Laboratory.

The Technical Representative shall provide technical direction which, depending on contract requirements, may be issued in writing or orally; however, written direction is always preferred in order to avoid confusion and to establish a record of all communications.

The Technical Representative approves the contractor's plans, designs, drawings, specifications, processes, and documentation as required.

The Technical Representative will serve as the responsible focal point for each contract in ensuring that Laboratory safety policies are complied with. It is his/her responsibility to coordinate and ensure that all Laboratory ESH safety approvals, practices and policies are accomplished for all work performed by contractors at the ANL site. These activities may include surveillance of contractor activities for compliance with safety provisions of contracts, as well as any applicable contractor safety plans approved by the Laboratory. Note that Technical Representatives will either personally survey contractors or suppliers, or established processes to ensure that they are in compliance with appropriate Laboratory safety policies at all times.

The Technical Representative coordinates availability/surveillance of ANL furnished (or contractor purchased) property, information and equipment as specified in the contract and assures coordination is affected with the Property Department to assure such equipment is documented and is included in ANL Property records.

The Technical Representative assures and documents quality assurance and contract performance and shall notify the Buyer/Contract Specialist of any deficiencies or instances of non-compliance with contract requirements.

The Technical Representative reviews and approves any final research reports, technical papers and presentations to technical societies, seminars, and/or public release.

2. All technical direction must be within the scope of the statement of work, and in accordance with contract terms. In the course of performing work, circumstances may arise that make it necessary to enlarge, reduce, or otherwise modify the statement of work. The Technical Representative is responsible for identification of the need for any change and determining if that change will have an effect on the purchase order, contract or agreement schedule, cost or statement of work. The Technical Representative must initiate a requisition, to accomplish any change that affects the period of performance, the price or estimate of costs, or the statement of work. Administrative changes, such as naming a new technical representative, or revising key personnel, may also be accomplished by issuance of a change requisition. Change requisitions are subject to the same type of reviews and approvals as original requisitions, and should be coordinated with the division office, other Laboratory divisions, as needed, and the Procurement Department. Direction outside the statement of work can result in cost overruns and /or claims from the vendor.

The Technical Representatives may be personally held financially responsible for issuance of direction outside the scope of statement of work.

The Technical Representative shall serve as a team member in any negotiations with the contractor resulting from changes.

The Technical Representative shall assist in any termination action and/or any contractor claims against the Laboratory.

3. Coordination of site access (including cyber-access) for suppliers with existing purchase orders, contracts, or agreements is the responsibility of the Technical Representative. Arrangements for site access must be coordinated with the Visitor Reception Center and/or the Office of Safeguards and Security, as required.

C. Acceptance of Deliverables

In Addition to the Receiving Department, the Technical Representatives may be responsible for verification of receipt of deliverables and for acceptance of those deliverables on behalf of the Laboratory. Such acceptance should be coordinated,

when appropriate, with division QAR. In the event deliverables are not received or are not accepted, the Procurement Department should be notified of the problem as soon as possible, and any action taken to correct the problem.

D. Invoice Approvals

The Technical Representative is responsible for the review and approval of Supplier invoices. This includes verifying that the products and or services that appear on the invoices have been received and are acceptable. This responsibility is coordinated by the Accounts Payable department, and entails a review of the detailed charges that may be submitted, and acceptance or exception to each item.

E. Standards of Conduct

The Technical Representative shall conduct all activities in a manner above reproach. Transactions relating to the commitment of Laboratory funds require the highest degree of trust and an impeccable standard of conduct. Compliance with all Laboratory policies, procedures, etc., including but not limited to ethics, business conduct, and conflicts of interests is mandatory.